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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Foreign Shipping to North Vietnam in April 1967

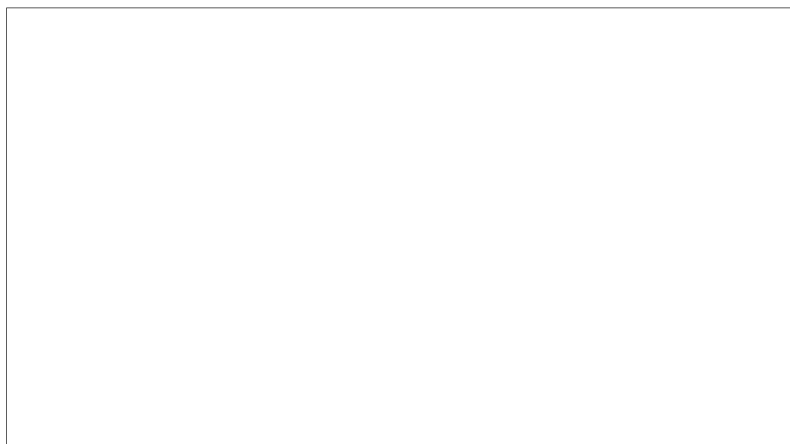
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SECRET**FOREWORD**

The data in this memorandum are preliminary and subject to modification as additional information becomes available. Significant changes may occur in data on ship arrivals and cargoes from Communist China and, to a lesser extent, in data on cargoes carried by ships of the Free World. Data on Soviet and Eastern European ship arrivals and cargoes and on Free World arrivals are not likely to be changed significantly. To reflect these changes a table showing monthly arrivals by flag is included in this memorandum. All data on cargoes carried are expressed in metric tons.

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FOREIGN SHIPPING TO NORTH VIETNAM
IN APRIL 1967*

Summary

Record volumes of food and general cargo imports, a near-record volume of total imports, and the lowest volume of exports in the last 28 months highlighted North Vietnam's identified seaborne foreign trade in April. ** Ships continued to discharge at Haiphong without undue delay, despite the exceptional volume of deliveries in March and April. No shipments of arms or ammunition were detected.

In April, 37 foreign ships called at North Vietnam, a slight decline from the level of the first quarter 1967 (see Figure 1). This decline in arrivals stemmed principally from a decrease in Soviet shipping, as shown in the tabulation below:

<u>Flag</u>	<u>Monthly Average First Quarter 1967</u>	<u>March</u>	<u>April</u>
Total	<u>40.3 ^{a/}</u>	<u>42</u>	<u>37</u>
Communist countries	<u>35.7</u>	<u>39</u>	<u>32</u>
USSR	21.0	23	18
Eastern Europe	3.7	4	4
Communist China	11.0	12	10
Free World	<u>4.7</u>	<u>3</u>	<u>2</u>
United Kingdom	4.0	3	4
Other	0.7	0	1

a. Because of rounding, components do not add to the total shown.

* This memorandum was produced by CIA. It was prepared by the Office of Research and Reports, and information on ship arrivals was coordinated with the Office of Naval Intelligence; the estimates and conclusions represent the best judgment of the Directorate of Intelligence as of 23 May 1967.

** For data on foreign-flag ship arrivals in April as well as imports and exports carried on foreign-flag ships, see Tables 1 through 4.

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Identified imports totaled 141,500 tons, only slightly less than the record volume delivered in March. Steel products, construction equipment, trucks, barges, machinery, rubber, and coking coal were the principal components of the record 65,300 tons of miscellaneous and general cargoes. The 37,300 tons of bulk foodstuffs delivered in April brought the total of these imports in the first four months of this year to 103,800 tons, compared with 77,600 tons in all of 1966. Only 13,000 tons of petroleum were imported, compared with an average of nearly 26,000 tons a month in the period December 1966 - March 1967. Seaborne deliveries of petroleum, however, are expected to exceed 26,000 tons in May.

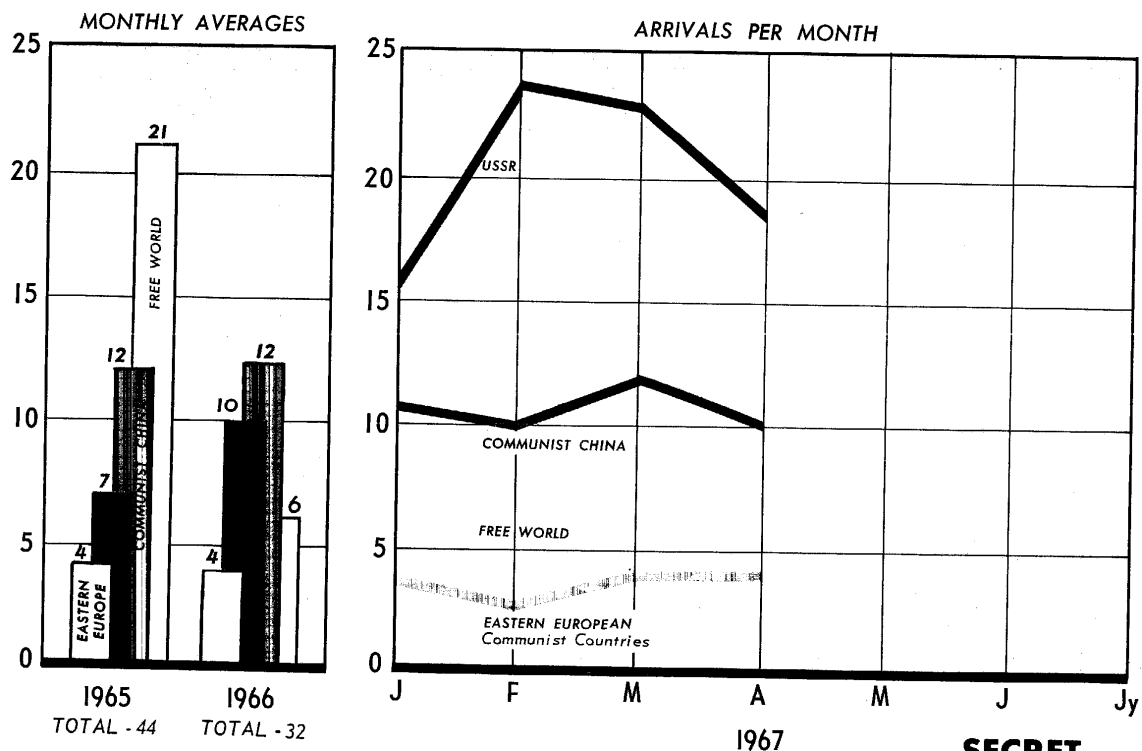
Shipments of all major categories of seaborne exports in April were below 1966 levels. Sharply curtailed coal shipments -- the result of air-strikes against coal facilities and powerplants in February and March -- were the principal cause of the extraordinarily low volume of exports.

A comparison of data for the first quarters of 1965 and 1967 reveals a significant decline in the role of the Free World as a supplier and a carrier of goods to North Vietnam. In contrast, the volume of shipments to North Vietnam from Eastern European countries increased more than four times during the period, and imports from the USSR and Communist China, the principal suppliers, more than doubled.

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Figure 1

North Vietnam: Foreign Ship Arrivals



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1. FREE WORLD SHIPPING

Five Free World ships called at North Vietnam in April. Four were Hong Kong-owned British-flag ships under time charter to Communist China: three delivered general cargoes from Communist China and one brought sugar from Cuba.* A Cypriot-flag ship under time charter to North Vietnam arrived with timber from Cambodia and rubber and coconut oil from Singapore. No cargoes were detected on the four Free World ships that left North Vietnam in April. All sailed for Hong Kong or Chinese Communist ports.

The British-flag ship Dartford sustained light damage during the 26 April airstrike against the Haiphong cement plant, and six of its crewmen, all Chinese, were wounded. Charges that the ship had been strafed almost certainly are false. The wharf where the Dartford was discharging coal is 0.8 mile from the cement plant (see Figure 2). The damage and injuries probably were caused by the heavy fall of flak from intense antiaircraft fire. The Soviet press reported that the decks of the Soviet ship Balashikha, which was berthed one-half mile farther from the cement plant than the Dartford, were littered with shell fragments following the raids.

The Dartford is owned by the Ocean Tramping Company, Ltd., a Hong Kong firm probably controlled by Communist China. Ships of this company, operating under time charters to Communist China, accounted for 32 of the 43 calls made at North Vietnam by British-flag ships in the period 1 January 1966 - 30 April 1967.

2. COMMUNIST SHIPPING

Soviet ships carried nearly 53 percent of all import and export cargoes identified on foreign ships in April. Eighteen Soviet ships delivered 71,400 tons of cargo, of which all except 100 tons was of Soviet origin. The major portion (55,100 tons) of the Soviet cargoes arrived from Novorossiysk on seven dry cargo ships. Seven Soviet ships -- three small tankers, three dry cargo ships carrying flour, and a freighter in ballast -- arrived from Vladivostok. Four Soviet ships arrived from Free World ports (three from Hong Kong and one from Bangkok).

* The ship was sub-chartered to North Vietnam for this voyage.

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Seventeen Soviet ships sailed from North Vietnam. Three tankers and three freighters left in ballast; five ships carried coal to Japan; two carried 2,600 tons of general cargoes to Hong Kong; three carried very small volumes of general cargoes to Singapore and Belawan, Indonesia, and one sailed with cement for Cambodia.

Three Soviet freighters under time charter to North Vietnam accounted for three calls and four departures from North Vietnam. Four other Soviet ships were under voyage charter to North Vietnam outbound. The chartered Soviet ships carried 26,000 tons of exports from North Vietnam in April, but delivered only 60 tons of imports.

The ten Chinese Communist ships that arrived in April were engaged primarily in delivering foodstuffs and loading North Vietnamese anthracite. All of them called initially at Haiphong, eight bringing rice, salt, and miscellaneous and general cargoes from China, and two delivering corn, POL, barges, and construction equipment from Constanta and rice from Cambodia. Eleven Chinese ships departed from North Vietnam in April, all bound for China. Five of them carried coal, but no cargoes were detected on the other six, which sailed directly from Haiphong to China.

Four Polish-flag ships arrived at North Vietnam with shipments from Eastern European countries. Nearly 54 percent of the 21,100 tons of cargo delivered by these ships was carried by two Chipolbrok* ships, whose cargoes included large quantities of vehicles and construction equipment (see Figures 3 and 4). Two Polish ocean liners carried miscellaneous and general cargoes to and from Eastern European countries. A Chipolbrok ship sailed with 600 tons of general cargo for Hong Kong and Japan.

3. THE SITUATION AT HAIPHONG PORT

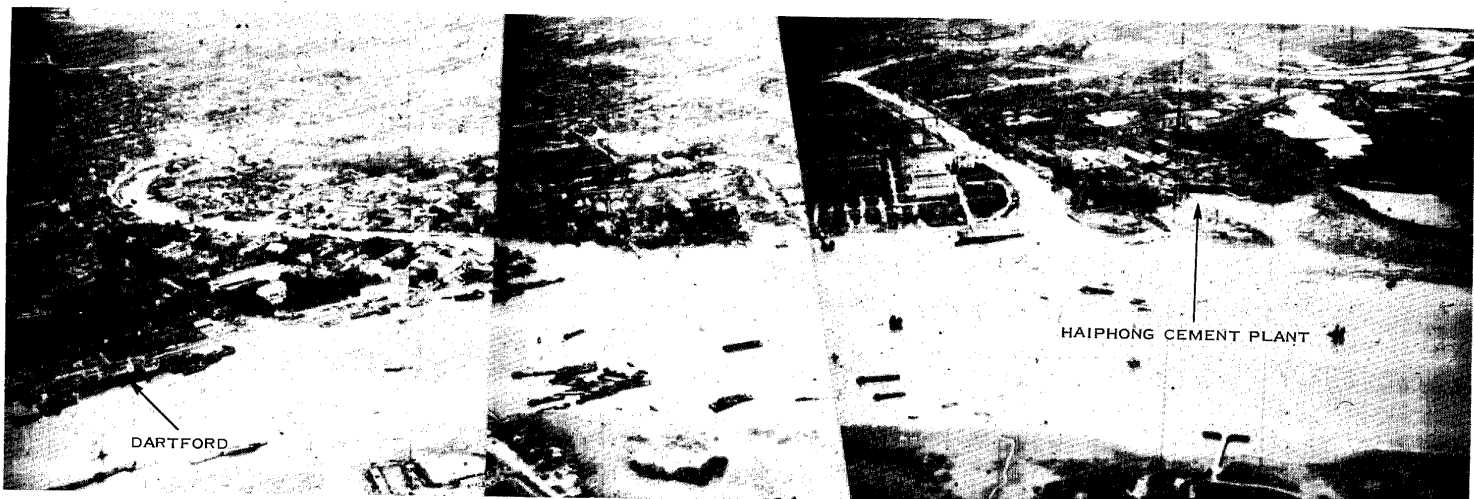
There are indications of some congestion at the port of Haiphong. Repeated aerial photography in March and April shows all berths occupied, numerous ships standing by in the channel and at anchorages, and open cargo storage overflowing the port area into streets, lots, and parks as far as the heart of the city. Officers of ships sailing to Haiphong report that silting has reduced the depth of the approach channel, causing some larger ships to await favorable tides before

* The Chinese-Polish Shipbrokers Company, which operates 16 Polish-flag ships.

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Figure 2

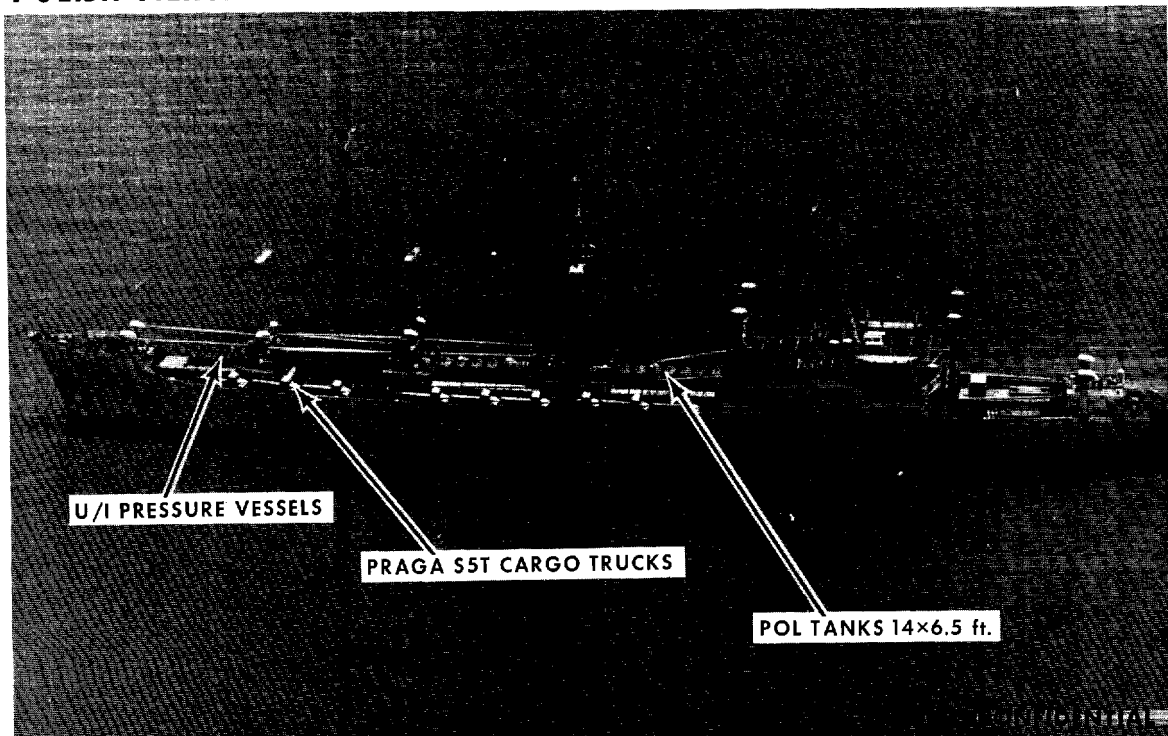
FIGURE 2. THE BRITISH-FLAGSHIP DARTFORD IN HAIPHONG HARBOR, 21 APRIL 1966



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Figure 3

POLISH MERCHANT SHIP "KRASZEWSKI"

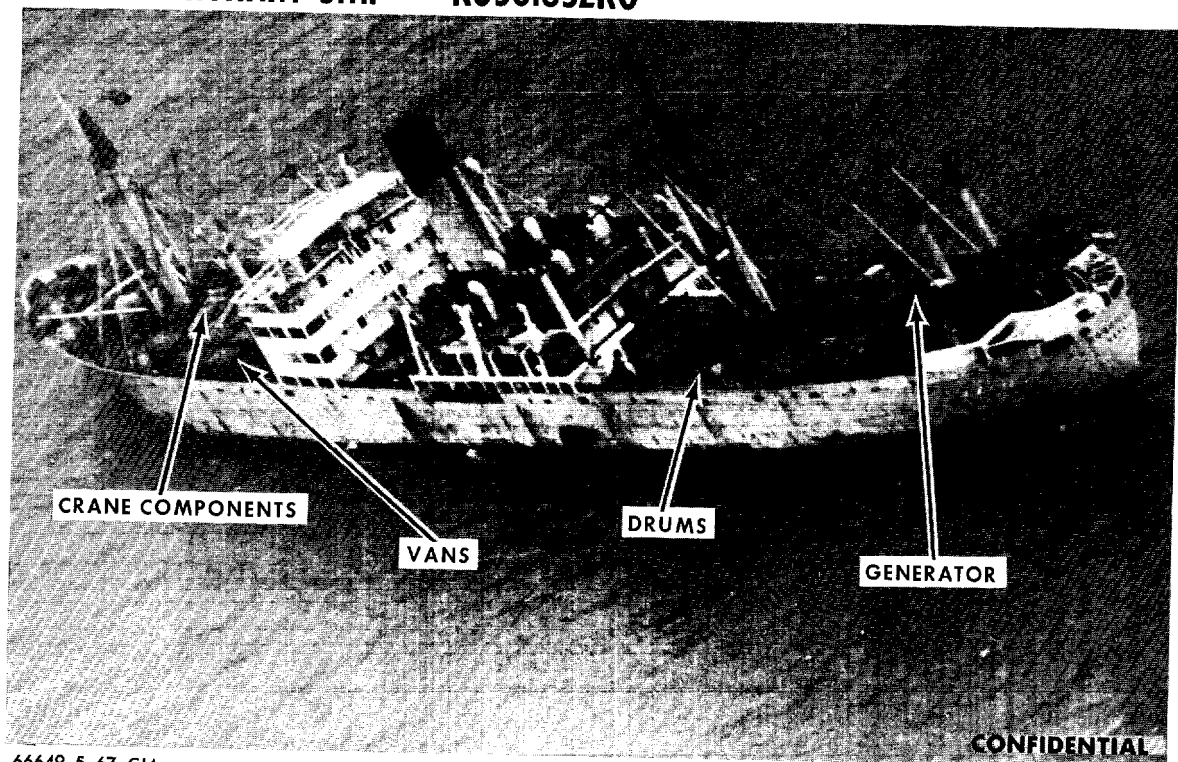


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DECK CARGO: 32 CZECH CARGO TRUCKS
12 U/I PRESSURE VESSELS
13 POL TANKS

Figure 4

POLISH MERCHANT SHIP "KOSCIUSZKO"



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CONFIDENTIAL

DECK CARGO: 3 CZECH SST TRUCKS
2 CZECH V3S TRUCKS
12 E. GERMAN W-50 TRUCKS
16 PROB. CZECH MOTOR VANS
15 TRAILER-MOUNTED GENERATORS
4 PROB. ENGINE-POWERED CRANE COMPONENTS

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entering. Despite these apparent problems, record volumes of cargoes were handled at Haiphong in March and April without undue delays to shipping.

In both March and April, ocean-going freighters loaded and unloaded an average of 4,900 tons of dry cargo* per day at Haiphong, compared with an average of 3,100 tons per day for the year 1966. Cargo congestion in the immediate port area has been alleviated by further extensions of open storage areas throughout the city and by extensive lightering of cargoes to distribution points along the numerous waterways. Significant additional increases in rates of cargo movement could be achieved by greater use of lighters, but these have been reported to be in short supply.**

Dry cargo ships departing from Haiphong in both March and April had been in port an average of 13 days, compared with average stays of about 10 days in the first half of 1966. Longer periods are required for the larger freighters. Stays at Haiphong for ships carrying over 7,000 tons of cargo averaged about three weeks during March and April, about the same as during June and July 1966, when dry cargo volumes handled at Haiphong were about one-third less. It now appears that ships carrying such large cargoes may average about four weeks in port in May, but no extraordinary delays appear likely.***

Silting of the river channel to Haiphong has, in recent months, caused ships with drafts exceeding 25 feet to await high tides before entering the port. A few have had to lighter off portions of their cargoes before entering. Despite the occasional delays to larger vessels, the overall volume of imports has not been affected by the silting. Failure to dredge the channel within a few months, however, could require a greater reliance on lightering from outside the port or the reduction of loads for the larger ships, such as those carrying food and industrial goods from Black Sea ports.

* The volume of identified dry cargoes, including POL in containers, plus estimated additional volumes carried by Chinese and North Vietnamese ships.

** Barges and lighters have been observed with increasing frequency in recent months among deck cargoes on freighters sailing to Haiphong.

*** Stays of 39 and 43 days were observed for ships at Haiphong in July and August of 1966.

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4. CARGOES

Seaborne imports to North Vietnam in April totaled 141,500 tons, only slightly less than the record volume delivered in March. Seaborne exports, however, dropped to the lowest volume of the past 28 months, primarily because damage caused by airstrikes retarded coal shipments. No imports of arms or ammunition were detected.

Imports of miscellaneous and general cargoes* totaled 65,300 tons, surpassing the record volume in March. The 28,000 tons shipped from the Soviet Union consisted largely of steel products and machinery. Shipments from Eastern European Communist countries, totaling 16,600 tons, included construction equipment, machinery, trucks, and barges. A 3,000-ton shipment of coking coal was the only item identified among 17,400 tons of miscellaneous and general cargoes from China. Nearly 3,300 tons were imported from Free World countries, including 1,800 tons of rubber from Singapore.

Imports of bulk foodstuffs in April amounted to 37,300 tons, the highest monthly volume on record. Imports of food by sea in the first four months of 1967 totaled 108,800 tons, compared with 77,600 tons in all of 1966. The USSR was the principal supplier in April, providing 11,500 tons (mostly flour). Other identified shipments of foodstuffs included 8,800 tons of sugar from Cuba, 5,600 tons of rice and 1,700 tons of salt from China, 5,000 tons of rice from Cambodia, and nearly 4,000 tons of corn from Rumania.

Imports of petroleum declined in April to 13,000 tons, the lowest monthly volume since November 1966.** A Chinese ship delivered 500 tons of POL from Rumania. The remaining 12,500 tons were of Soviet origin, 11,900 tons of which arrived on three small tankers from Vladivostok. The scheduled arrival in May of an 11,000-ton shipment of petroleum from the Black Sea and indications of the scheduling of a similar shipment for June may portend a return to primary reliance on that mode of shipment for Soviet bulk petroleum deliveries to North Vietnam.***

* Cargoes other than petroleum, fertilizer, bulk foodstuffs, and timber.

** In the period December 1966 - March 1967, seaborne imports of petroleum averaged nearly 26,000 tons a month. Petroleum imports in May apparently will exceed 26,000 tons.

*** Until October 1966, nearly all deliveries of Soviet petroleum in bulk were made in 11,000-ton shipments from the Black Sea.

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Imports of fertilizer amounted to 25,000 tons. Deliveries of fertilizer in the period January-April totaled 100,900 tons, about the same volume as in the corresponding period of 1966. The Soviet Union (19,200 tons) and Poland (5,800 tons) provided all of the fertilizer imported by sea in April.

The effects of airstrikes in February and March on the Hon Gai power station, coal-processing facilities at Cam Pha, and possibly also on similar coal facilities at Hon Gai became apparent in April as coal shipments fell to 36,200 tons, the lowest monthly volume recorded in recent years. Seaborne coal shipments had averaged 136,600 tons* a month in the three months prior to the first crippling airstrikes against coal-processing facilities at Cam Pha in April 1966. The subsequent recovery of coal exports was slow and incomplete. Seaborne shipments reached a peak post-strike volume of 78,800 tons in February 1967. All of the coal shipped in April went to Japan (19,500 tons) and Communist China (16,700 tons).

Other seaborne exports in April were below 1966 levels, as shown in the tabulation below:

	Volumes Exported Monthly (Thousand Metric Tons)		
	<u>Cement</u>	<u>Pig Iron</u>	<u>Miscellaneous and General Cargoes</u>
1966 (Monthly Average)	8.3	3.3	6.7
April 1967	4.0	0.4	4.6

Because exports of both cement and pig iron fluctuate widely, it may be premature to attribute the small volumes shipped in April to the effects of recent airstrikes against the principal producing plants.

* Review of 1966 data revealed 28,400 tons of previously unrecorded coal exports, bringing the total for January-March 1966 to 409,700 tons.

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5. ORIGINS AND VOLUMES OF SPECIFIC SEABORNE IMPORTS,
FIRST QUARTERS, 1965-67

A comparison of the volumes and origins of seaborne imports in the first quarters of the last three years (see Figures 5 and 6) reveals a significant decline in the role of the Free World as a supplier and carrier of goods to North Vietnam. Free World countries, which supplied 14 percent of the volume of North Vietnam's seaborne imports in the first quarter of 1965, supplied only 5 percent in the first quarter of 1967. Free World ships carried 27 percent of North Vietnam's seaborne imports to North Vietnam in the first quarter of 1965 but only 14 percent in the first quarter of 1967.

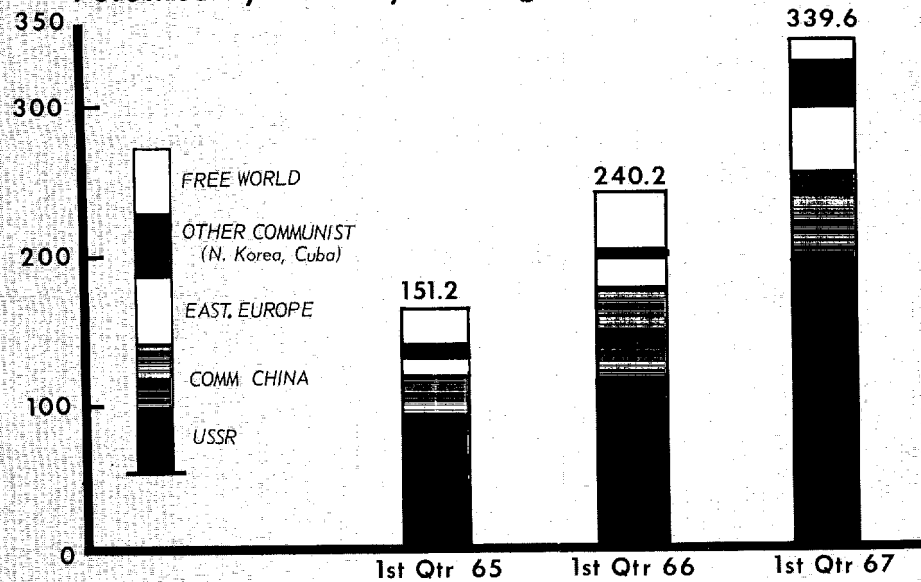
Seaborne imports more than doubled between the first quarters of 1965 and 1967. Except for timber,* volumes of all major categories of imports increased significantly, with bulk foodstuffs and petroleum registering the greatest gains.

Imports from Eastern European Communist countries in the first quarter of 1967 were four times those of the first quarter of 1965, and imports from the USSR and Communist China, the principal suppliers, more than doubled in this period.

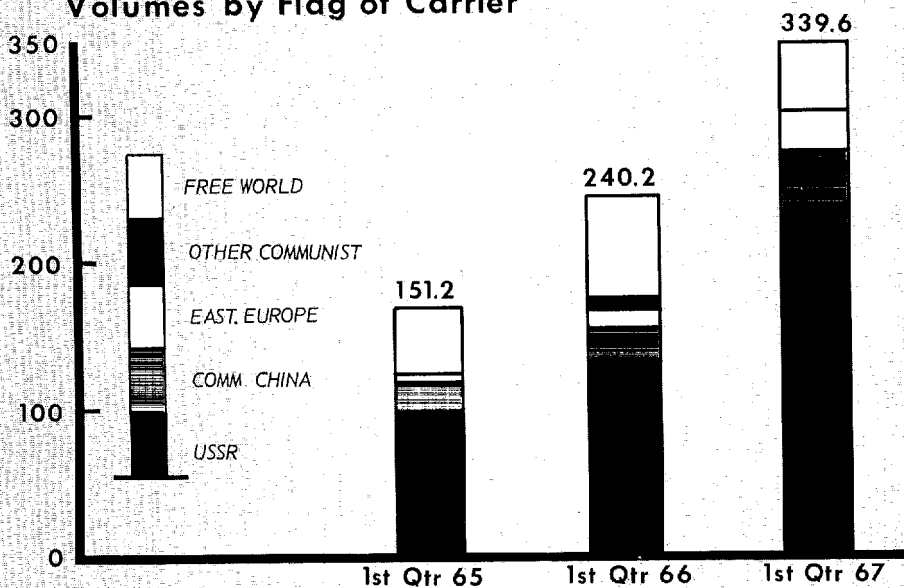
* Imports of timber, principally from Cambodia, remained relatively stable in these quarterly periods: 6,900 tons in 1965, 6,600 tons in 1966, and 7,200 tons in 1967.

NORTH VIETNAM: Origin and Carriers of Seaborne Imports, First Quarters, 1965-67 (Thousand Metric Tons)

Volumes by Country of Origin



Volumes by Flag of Carrier

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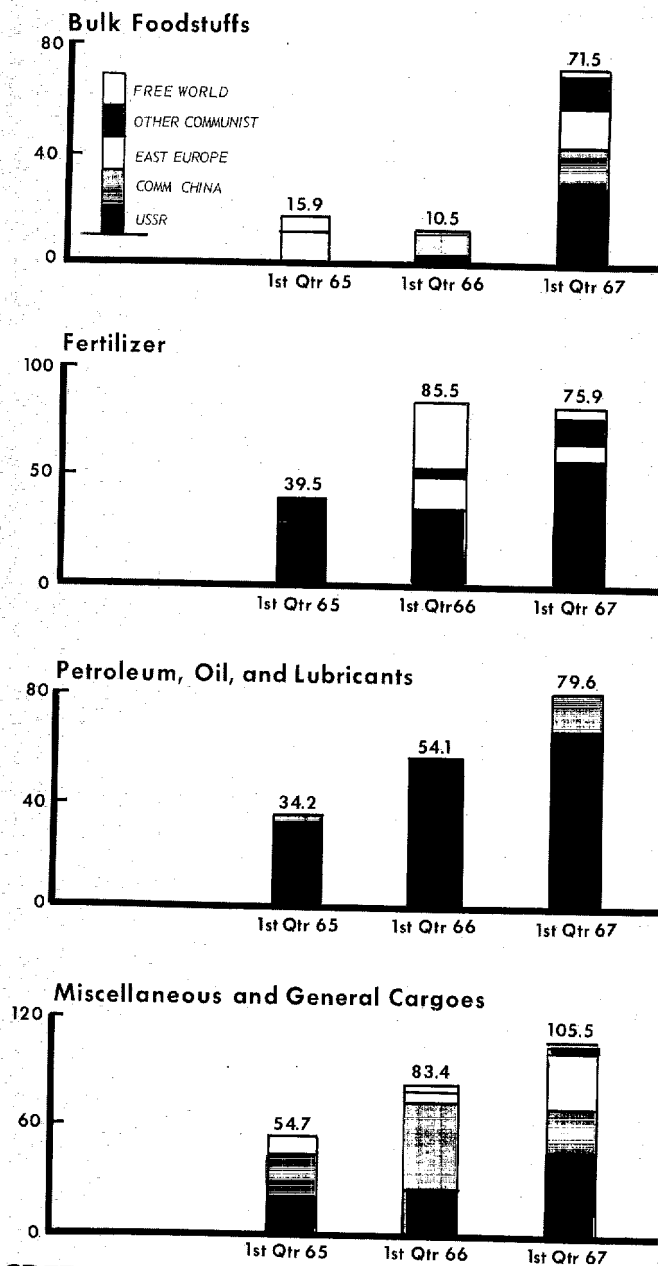
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GROUP 1:
Excluded from automatic
downgrading and declassification

Figure 6

NORTH VIETNAM: Origins of Selected Seaborne Imports First Quarters, 1965-67

(Thousand Metric Tons)



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GROUP 1
Excluded from automatic
downgrading and declassification

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Table 1

North Vietnam: Foreign-Flag Ship Arrivals a/
March, April, and Cumulative 1967

Flag	April		March		Cumulative	
	Number	Percent	Number	Percent	Number	Percent
Total	<u>37</u>	<u>100.0</u>	<u>42</u>	<u>100.0</u>	<u>158</u>	<u>100.0</u>
Communist countries	<u>32</u>	<u>86.5</u>	<u>39</u>	<u>92.9</u>	<u>139</u>	<u>88.0</u>
USSR	18	48.6	23	54.8	81	51.3
Eastern Europe	4	10.8	4	9.5	15	9.5
Bulgaria			1	2.4	4	2.5
Poland	4	10.8	3	7.1	11	7.0
Communist China	10	27.0	12	28.6	43	27.2
Free World	<u>5</u>	<u>13.5</u>	<u>3</u>	<u>7.1</u>	<u>19</u>	<u>12.0</u>
Cyprus	1	2.7			2	1.3
Malta					1	0.6
United Kingdom	4	10.8	3	7.1	16	10.1

a. Because of rounding, components may not add to the totals shown.

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Table 2

North Vietnam: Tonnage of Foreign-Flag Ship Arrivals ^a/
March, April, and Cumulative 1967

Type of Ship and Flag	April		March		Cumulative	
	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons
Total	<u>37</u>	<u>191.5</u>	<u>42</u>	<u>201.6</u>	<u>158</u>	<u>769.2</u>
Dry cargo	34	181.4	36	181.5	139	698.9
Tanker	3	10.1	6	20.1	19	70.3
Communist countries	<u>32</u>	<u>166.8</u>	<u>39</u>	<u>191.8</u>	<u>139</u>	<u>676.1</u>
USSR	18	95.4	23	116.6	81	396.2
Eastern Europe	4	38.7	4	28.3	15	118.4
Communist China	10	32.7	12	46.9	43	161.5
Free World	<u>5</u>	<u>24.7</u>	<u>3</u>	<u>9.7</u>	<u>19</u>	<u>93.0</u>

a. The aggregate tonnage of ships calling is not necessarily correlative to the actual volume of cargoes moving into and out of North Vietnam, but these data are of value as indications of relative changes in the volume of shipping. Because of rounding, components may not add to the totals shown.

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Table 3

North Vietnam: Identified Imports Carried by Foreign-Flag Ships a/
April 1967

Thousand Metric Tons						
Flag	Commodity					Total
	Ammonium Sulfate and other Fertilizers	Petroleum	Bulk Foodstuffs	Timber	Miscellaneous	
Total	<u>25.0</u>	<u>13.0</u>	<u>37.3</u>	<u>0.9</u>	<u>65.3</u>	<u>141.5</u>
Communist ships	<u>25.0</u>	<u>13.0</u>	<u>28.0</u>	<u>0</u>	<u>52.5</u>	<u>118.6</u>
USSR	19.2	12.5 <u>b/</u>	11.5		28.1	71.4
Eastern Europe	5.8		0.3		15.0	21.1
Communist China <u>c/</u>		0.5 <u>d/</u>	16.2		9.4	26.1
Free World ships	<u>0</u>	<u>0</u>	<u>9.2</u>	<u>0.9</u>	<u>12.9 <u>e/</u></u>	<u>23.0</u>

a. Identified imports include some estimates of bulk cargoes, using methods which have proved to be highly reliable. Because of rounding, components may not add to the totals shown.

b. Including 630 tons carried on dry cargo ships.

c. An additional unknown quantity of imports may have been carried by Chinese Communist ships.

d. Carried on dry cargo ships.

e. Including 3,000 tons of coking coal.

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Table 4

North Vietnam: Identified Exports Carried by Foreign-Flag Ships a/
April 1967

Flag	Commodity				Total
	Coal	Cement	Pig Iron	Miscellaneous	
Total	<u>36.2</u>	<u>4.0</u>	<u>0.4</u>	<u>4.6</u>	<u>45.2</u>
Communist ships	<u>36.2</u>	<u>4.0</u>	<u>0.4</u>	<u>4.6</u>	<u>45.2</u>
USSR	19.5	4.0	0.4	2.9	26.8
Eastern Europe				1.8	1.8
Communist China <u>b/</u>	16.7			Negl.	16.7
Free World ships	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>

a. Identified exports include some estimates of bulk cargoes, using methods which have proved to be highly reliable. Because of rounding, components may not add to the totals shown.

b. An additional unknown quantity of exports may have been carried by Chinese Communist ships.

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